

1 What is claimed is:

2 1. A computer-implemented system for supporting financial decisions by alerting a
3 user when the number of references to a selected financial instrument on at least
4 one selected internet site exceeds a pre-determined amount, the system
5 comprising:

6

7 means for searching the selected internet site for references to the selected
8 financial instrument;

9 means for counting a time-defined number of references to the selected
10 financial instrument on the selected internet site over a first period of time;

11 means for setting a threshold number of references; and

12 means for sending an alert to the user of the system when the time-defined
13 number of references to the selected stock in the first period of time exceeds the
14 threshold number of references.

15 2. The system of claim 1 wherein the threshold number of references is an average
16 reference number, and the means for setting a threshold number of references
17 further comprises means for determining the average number of references in a
18 second period of time.

19 3. The system of claim 2 wherein the means for determining the average number of
20 references further comprises:

21 means for storing information representative of the number of references
22 to the selected financial instrument over the second period of time;

23 means for determining the average number of references over the second
24 period of time; and

25 means for comparing the counted number of references to the selected
26 financial instrument on the selected internet sites over the first period of time with
27 the average number of references.

1 4. A computer-implemented method for supporting financial decisions by alerting a
2 user when the number of references to a selected financial instrument on at least one
3 selected internet site exceeds a pre-determined amount, the method comprising:

4 searching the selected internet site for references to the selected financial
5 instrument;

6 counting a time-defined number of references to the selected financial
7 instrument on the selected internet site over a first period of time;

8 setting a threshold number of references; and

9 sending an alert to the user when the time-defined number of references to
10 the selected stock in the first period of time exceeds the threshold number of
11 references.

12 5. The method of claim 4 wherein the threshold number of references is an average
13 reference number, and setting a threshold number of references further comprises
14 determining the average number of references in a second period of time.

15 6. The system of claim 5 wherein determining the average number of references
16 further comprises:

17 storing information representative of the number of references to the
18 selected financial instrument over the second period of time;

19 determining the average number of references over the second period of
20 time; and

21 comparing the counted number of references to the selected financial
22 instrument on the selected internet sites over the first period of time with the
23 average number of references.

24 7. A computer-implemented system for supporting financial decisions by searching
25 for similar securities, the system comprising:

26 means for receiving a user-specified security from a user;

27 means for determining a similarity criteria comprised of at least two
28 security attributes, each with an associated relative weight;

1 means for searching a set of securities wherein each security in the set has
2 associated similarity attributes, each security attribute having a value;

3 means for determining a group of similar securities from the set of
4 securities by weighting the difference between the value of each attribute of each
5 security in the set and the value of the corresponding attribute of the user-
6 specified security using the associated relative weight; and

7 means for displaying the group of similar securities.

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10 8. The system of claim 7 wherein the security attribute is one of market valuation,
11 balance sheet strength, operating history, price performance, growth, profitability,
12 dividend potential, or entity size.

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14 9. A computer-implemented system for supporting financial decisions by searching
15 for similar securities, the system comprising:

16 means for receiving a user-specified security from a user;
17 means for determining a similarity criteria comprised of at least two
18 security attributes;

19 means for searching a set of securities wherein each security in the set has
20 associated similarity attributes, each security attribute having a value;

21 means for determining a group of similar securities from the set of
22 securities by comparing the difference between the value of each attribute of each
23 security in the set and the value of the corresponding attribute of the user-
24 specified security; and

25 means for displaying the group of similar securities.

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27 10. The system of claim 9 wherein each security attribute has an associated relative
28 weight, and the means for determining the group of similar securities further
29 comprises means for weighting the difference between the values of the attributes
30 using the associated relative weight.

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- 1 11. The system of claim 9 wherein the difference between the value of the attribute of
2 each security in the set and the value of the corresponding attribute of the user-
3 specified security is a metric.
- 4
- 5 12. The system of claim 11 wherein the metric further comprises a similarity distance.
- 6
- 7 13. The system of claim 12 wherein the metric further comprises a weighted
8 Euclidean distance.
- 9
- 10 14. The system of claim 13 wherein the similar securities are sorted by a user-defined
11 priority list.
- 12
- 13 15. A computer-implemented method for supporting financial decisions by searching
14 for similar securities, the method comprising:
15 receiving a user-specified security from a user;
16 determining a similarity criteria comprised of at least two security
17 attributes, each with an associated relative weight;
18 searching a set of securities wherein each security in the set has
19 associated similarity attributes, each security attribute having a value;
20 determining a group of similar securities from the set of securities by
21 weighting the difference between the value of each attribute of each security in
22 the set and the value of the corresponding attribute of the user-specified security
23 using the associated relative weight; and
24 displaying the group of similar securities.
- 25
- 26 16. The method of claim 15 wherein the security attribute is one of market valuation,
27 balance sheet strength, operating history, price performance, growth, profitability,
28 dividend potential, or entity size.
- 29
- 30 17. A computer-implemented method for supporting financial decisions by searching
31 for similar securities, the method comprising:

- 1 receiving a user-specified security from a user;
- 2 determining a similarity criteria comprised of at least two security
- 3 attributes;
- 4 searching a set of securities wherein each security in the set has
- 5 associated similarity attributes, each security attribute having a value;
- 6 determining a group of similar securities from the set of securities by
- 7 comparing the difference between the value of each attribute of each security in
- 8 the set and the value of the corresponding attribute of the user-specified security;
- 9 and
- 10 displaying the group of similar securities.
- 11
- 12 18. The method of claim 17 wherein each security attribute has an associated relative
- 13 weight, and determining the group of similar securities further comprises
- 14 weighting the difference between the values of the attributes using the associated
- 15 relative weight.
- 16
- 17 19. The method of claim 18 wherein the difference between the value each attribute
- 18 of each security in the set and the value of the corresponding attribute of the user-
- 19 specified security is a metric.
- 20
- 21 20. The method of claim 19 wherein the metric further comprises a similarity
- 22 distance.
- 23
- 24 21. The method of claim 19 wherein the metric further comprises a weighted
- 25 Euclidean distance.
- 26
- 27 22. The method of claim 21 wherein the similar securities are sorted by a user-defined
- 28 priority list.
- 29 23. A computer-implemented system for supporting financial decisions by searching
- 30 for a similar portfolio, the system comprising:

means for receiving a user-specified portfolio comprised of a plurality of securities from a user;

means for receiving a similarity criteria comprised of at least one security attribute and an associated relative weight from a user;

means for searching a set of securities, each security having associated security attributes;

means for determining a similar security, from the set of securities, for each security in the user-specified portfolio by comparing the security attribute of each security in the user-specified portfolio to the security attribute of each security in the set of securities;

means for creating a similar portfolio comprised of the similar securities; and

means for displaying the similar portfolio.

24. The system of claim 23 wherein the difference between the value of each attribute of each security in the user-specified portfolio and the value of the corresponding attribute of the security in the set of securities is a similarity distance metric.

25. A computer-implemented method for supporting financial decisions by searching for a similar portfolio, the method comprising:

receiving a user-specified portfolio comprised of a plurality of securities from a user;

receiving a similarity criteria comprised of at least one security attribute and an associated relative weight from a user;

searching a set of securities, each security having associated security attributes;

determining a similar security, from the set of securities, for each security in the user-specified portfolio by comparing the security attribute of each security in the user-specified portfolio to the security attribute of each security in the set of securities;

creating a similar portfolio comprised of the similar securities; and

1 displaying the similar portfolio.

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3 26. The method of claim 25 wherein the difference between the value of each
4 attribute of each security in the user-specified portfolio and the value of the
5 corresponding attribute of the security in the set of securities is a similarity
6 distance metric.

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8 27. A computer-implemented system for supporting financial decisions by
9 searching for dissimilar securities, the system comprising:

10 means for receiving a user-specified security from a user;
11 means for determining a similarity criteria comprised of at least one
12 security attribute;

13 means for determining a dissimilarity criteria;
14 means for determining a set of similar securities from a set of securities by
15 comparing the security attribute of the user-specified security with the security
16 attribute of the securities in the set of securities;

17 means for determining which of the similar securities meet the
18 dissimilarity criteria when compared to the user-specified security; and
19 means for displaying the dissimilar securities.

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21 28. The system of claim 27 wherein the means for determining the set of similar
22 securities is further comprised of means for calculating a metric representing the
23 difference between each attribute of the user-specified security and each attribute
24 of each security in the set of securities.

25 29. A computer-implemented method for supporting financial decisions by searching
26 for dissimilar securities, the method comprising:

27 receiving a user-specified security from a user;
28 determining a similarity criteria comprised of at least one security
29 attribute;

- 1 determining a dissimilarity criteria;
- 2 determining a set of similar securities from a set of securities by
- 3 comparing the security attribute of the user-specified security with the security
- 4 attribute of the securities in the set of securities;
- 5 determining which of the similar securities meet the dissimilarity criteria
- 6 when compared to the user-specified security; and
- 7 displaying the dissimilar securities.
- 8
- 9 30. The method of claim 29 wherein determining the set of similar securities is
- 10 further comprised of calculating a metric representing the difference between each
- 11 attribute of the user-specified security and each attribute of each security in the set
- 12 of securities.
- 13 31. A computer-implemented system for supporting financial decisions by searching
- 14 for securities having user-specified attributes, the system comprising:
- 15 means for receiving a user-specified similarity criteria comprised of at
- 16 least two security attributes, each with an associated relative weight;
- 17 means for searching a set of securities wherein each security in the set has
- 18 associated similarity attributes, each security attribute having a value;
- 19 means for determining a group of similar securities from the set of
- 20 securities by weighting the difference between the value of each attribute of each
- 21 security in the set and the value of the corresponding user-specified security
- 22 attributes; and
- 23 means for displaying the securities having the user-specified attributes.
- 24
- 25 32. The system of claim 31 wherein the difference between the value of each attribute
- 26 of each security in the set and the value of the corresponding user-specified
- 27 security attributes is further comprised of a metric between the user-specified
- 28 security and each of the similar securities.
- 29
- 30 33. A computer-implemented method for supporting financial decisions by searching
- 31 for securities having user-specified attributes, the method comprising:

- 1 receiving a user-specified similarity criteria comprised of at least two
2 security attributes, each with an associated relative weight;
3 searching a set of securities wherein each security in the set has
4 associated similarity attributes, each security attribute having a value;
5 determining a group of similar securities from the set of securities by
6 weighting the difference between the value of each attribute of each security in
7 the set and the value of the corresponding user-specified security attributes; and
8 displaying the securities having the user-specified attributes.
- 9
- 10 34. The method of claim 33 wherein the difference between the value of each
11 attribute of each security in the set and the value of the corresponding user-
12 specified security attributes is further comprised of a metric between the user-
13 specified security and each of the similar securities.
- 14
- 15 35. A computer-implemented interactive display system for supporting financial
16 decisions by allowing a user to visually display financial entities and a dynamic
17 relationship between the financial entities on a graphical user interface, the system
18 comprising:
19 a graphical user interface (GUI) disposed on the display system,
20 means for displaying a first icon representative of a first financial entity,
21 wherein a characteristic of the first icon represents a quantity of interest of the
22 first financial entity;
23 means for displaying a second icon representative of a second financial
24 entity, wherein a characteristic of the second icon represents a quantity of interest
25 of the second financial entity;
26 means for displaying a symbol representative of a user-defined dynamic
27 relationship between the first financial entity and the second financial entity
28 wherein a characteristic of the symbol represents a quantity of interest of the
29 relationship;
30 means for detecting a change in the quantity of interest of the first
31 financial interest;

- means for changing the characteristic of the first icon in response to detecting a change in the quantity of interest of the first financial entity;
- means for detecting a change in the quantity of interest of the second financial entity; and
- means for changing the characteristic of the second icon in response to detecting a change in the quantity of interest of the second financial entity.
36. The system of claim 35 wherein the characteristic of the icon is a color-code.
37. The system of claim 36 wherein the quantity of interest is a change in value of the financial entity over a pre-determined time period.
38. The system of claim 37 wherein the size of the first icon represents a parameter of the financial entity.
39. The system of claim 38 wherein the parameter is one of market capitalization, revenues or earnings of the financial entity.
40. The system of claim 39 wherein the financial entity is a stock value of a company.
41. The system of claim 39 wherein the financial entity is a stock value of a group of companies.
42. The system of claim 38 wherein an icon includes a geometric shape.
43. The system of claim 42 wherein the geometric shape includes circle, triangle or square.
44. The system of 43 wherein the geometric shape has different fill pattern including solid or hollow.
45. The system of 44 wherein the symbol representative of the user-defined relationship is a line.
46. The system of claim 45 wherein the line is color-coded.

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- 2 47. The system of claim 46 wherein the color-code of the line is defined as a function
- 3 of the attributes of the relationship between the first financial entity and the
- 4 second financial entity.
- 5
- 6 48. The system of claim 47 wherein the line comprises a width that is variable and the
- 7 line width is defined as a function of the relative relationship between the first
- 8 financial entity and the second financial entity.
- 9
- 10 49. A computer-implemented interactive display method for supporting financial
- 11 decisions by allowing a user to visually display financial entities and a dynamic
- 12 relationship between the financial entities on a graphical user interface, the
- 13 method comprising:
- 14 displaying, to the user, a first icon representative of a first financial entity,
- 15 wherein a characteristic of the first icon represents a quantity of interest of the
- 16 first financial entity;
- 17 displaying, to the user, a second icon representative of a second financial
- 18 entity, wherein a characteristic of the second icon represents a quantity of interest
- 19 of the second financial entity;
- 20 displaying, to the user, a symbol representative of a user-defined
- 21 dynamic relationship between the first financial entity and the second financial
- 22 entity wherein a characteristic of the symbol represents a quantity of interest of
- 23 the relationship;
- 24 detecting a change in the quantity of interest of the first financial interest;
- 25 changing the characteristic of the first icon in response to detecting a
- 26 change in the quantity of interest of the first financial entity;
- 27 detecting a change in the quantity of interest of the second financial
- 28 entity; and
- 29 changing the characteristic of the second icon in response to detecting a
- 30 change in the quantity of interest of the second financial entity.
- 31

- 1 50. The method of claim 49 wherein the characteristic of the icon is a color-code.
- 2 51. The method of claim 50 wherein the quantity of interest is a change in value of
- 3 the financial entity over a pre-determined time period.
- 4 52. The method of claim 51 wherein the size of the first icon represents a parameter
- 5 of the financial entity.
- 6 53. The method of claim 52 wherein the parameter is one of market capitalization,
- 7 revenues or earnings of the financial entity.
- 8 54. The method of claim 53 wherein the financial entity is a stock value of a
- 9 company.
- 10 55. The method of claim 53 wherein the financial entity is a stock value of a group of
- 11 companies.
- 12 56. The method of claim 53 wherein an icon includes a geometric shape.
- 13
- 14 57. The method of claim 56 wherein the geometric shape includes circle, triangle or
- 15 square.
- 16
- 17 58. The method of 59 wherein the geometric shape has different fill pattern including
- 18 solid or hollow.
- 19
- 20 59. The method of 58 wherein the symbol representative of the user-defined
- 21 relationship is a line.
- 22
- 23 60. The method of claim 59 wherein the line is color-coded.
- 24
- 25 61. The method of claim 60 wherein the color-code of the line is defined as a function
- 26 of the attributes of the relationship between the first financial entity and the
- 27 second financial entity.
- 28

1 62. The method of claim 61 wherein the line comprises a width that is variable and
2 the line width is defined as a function of the relative relationship between the first
3 financial entity and the second financial entity.

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